

Legal Secretary Practice and Matter Administration Training Course

18 – 22 October 2027
San Diego

AGILE LEADERS
Training Center

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Ref: 1764_232616 **Date:** 18 – 22 October 2027 **Location:** San Diego **Fees:** 14000 Euro

Course Overview

The Legal Secretary Practice and Matter Administration Training Course develops the operational discipline needed to support lawyers and legal teams without crossing into legal advice. Participants build workflows for legal secretary practice and matter administration, from intake and conflict-check information through document production, court filing, diary control, client communication, billing support, closure, and archiving. The practical learning experience is delivered by Agile Leaders Training Center.

The course combines legal document preparation and quality control with legal diary and deadline management, legal matter file administration, and client confidentiality and privilege awareness through applied checklists, registers, templates, and exercises.

Who Should Attend

- Legal secretaries and legal administrative assistants
- Legal practice assistants and litigation secretaries
- Junior legal coordinators and court support assistants
- Office administrators moving into legal services

Course Objectives

- Define the legal secretary role, authority, ethical duties, and professional boundaries.
- Capture accurate client and matter intake information and support conflict-check escalation.
- Prepare, format, proofread, approve, and distribute legal document packs.
- Maintain calendars, hearing dates, filing deadlines, reminders, and escalation controls.
- Organise secure electronic and paper matter files with consistent indexing and retention controls.
- Record client communications and support meetings, time entry, billing, and matter closure.

Day 1: Legal Office Role, Ethics, and Matter Intake

- Legal Secretary Role, Authority, and Professional Boundary Map
- Legal Terminology, Matter Type, and Process Overview
- Client and Matter Intake Information Checklist
- Conflict-Check Information and Escalation Record
- Confidentiality, Privilege Awareness, Access, and Secure Handling

Day 2: Legal Documents and Quality Control

- Instruction, Dictation, Template, and Precedent Workflow
- Legal Correspondence, Court Form, Statement, and Filing Pack
- Formatting, Citation, Pagination, Exhibit, and Annex Control
- Proofreading, Accuracy, Consistency, and Completion Checklist
- Version, Approval, Signature, Copy, and Distribution Register

Day 3: Diaries, Deadlines, and Filing Workflows

- Matter Calendar, Limitation, Hearing, and Filing Deadline Register
- Appointment, Meeting, Hearing, and Travel Coordination
- Court and Authority Filing Requirement Checklist
- Service, Delivery, Receipt, and Acknowledgement Tracking
- Reminder, Escalation, Contingency, and Deadline Recovery Plan

Day 4: Matter Files, Clients, and Office Administration

- Electronic and Paper Matter File Structure
- Naming, Indexing, Search, Access, and Retention Controls
- Client Enquiry, Call, Message, and Attendance Note Standards
- Meeting Pack, Action Log, Follow-Up, and Status Update
- Time Entry, Billing Support, Expense, Invoice, and Disbursement Check

Day 5: Legal Secretary Practice

- Exercise: Open and Organise a New Legal Matter
- Exercise: Prepare and Quality-Check a Legal Document Pack
- Exercise: Build a Deadline and Filing Control Plan
- Exercise: Manage Client Communications and Billing Support
- Capstone: Legal Secretary Practice Administration File

Practical Exercises

- Complete an intake and conflict-check information record.
- Proofread and assemble a court-ready document pack.
- Create a filing calendar with reminders and escalation points.
- Build a secure matter-file index and communication log.
- Complete a time-entry and billing-support reconciliation.

Frequently Asked Questions

Is a legal secretary the same as a company or board secretary?

No. This course supports legal matters, documents, deadlines, clients, and office workflows, not corporate governance or board administration.

Can a legal secretary give legal advice?

No. Participants support authorised legal professionals, maintain role boundaries, and escalate substantive legal questions.

How are court and filing deadlines controlled?

Through a verified deadline register, reminders, responsibility assignments, filing evidence, escalation points, and contingency actions.

How are confidentiality and privilege handled?

Through need-to-know access, secure handling, recipient checks, communication controls, incident escalation, and privilege awareness.

What does the final administration file contain?

It combines intake records, a document pack, deadline controls, file index, communication records, and billing-support checks.

Conclusion

Participants leave with a practical, repeatable administration system that improves accuracy, confidentiality, timeliness, and service across legal matters.